

Artisanal Foundation

RETAILER & BUYER EDITION

THE BUYER'S CASE FOR CERTIFIED ARTISANAL

How third-party verification reduces assortment risk, simplifies consumer decisions, and unlocks premium shelf performance for specialty retail.

SCROLL OR PRESS ARROW KEYS TO NAVIGATE

CLAIM SATURATION

SPECIALTY SHELVES ARE SATURATED WITH UNVERIFIABLE PRODUCTION NARRATIVES

The average specialty food buyer evaluates hundreds of supplier pitches per quarter. The majority include language like "artisanal," "handcrafted," or "small-batch" -- none of which can be independently confirmed. FMI and NielsenIQ report that shoppers increasingly prioritize product information, yet the claims growing fastest are the ones with the least institutional backing. Buyers carry the downstream risk when those claims fail consumer scrutiny.

KEY IMPLICATION

Demand for verified product information is growing faster than the supply of verifiable claims. Buyers who can confirm what they stock hold a structural advantage.

206B+

TOTAL SPECIALTY FOOD SALES

U.S. specialty food market total sales as of 2024, up from \$194B in 2023

Specialty Food Association, State of the Specialty Food Industry, 2024-25

59%

WANT PRODUCTION INFO

Of consumers say information about how products are produced matters to their purchase

FMI/NielsenIQ, Transparency Trends, 2023

49%

SEEK CERTIFICATIONS

Of consumers say certifications and claims on packaging influence their decisions

Purdue CF DAS / FMI Traceability Study, 2023

8%

CLEAN LABEL PREMIUM

Year-over-year sales growth for verified clean-label products vs. conventional peers

NielsenIQ, State of Better For Products, 2024

ASSORTMENT RISK

WHAT BUYERS CAN AND CANNOT VERIFY TODAY

Most product attributes that drive specialty premiums have no independent confirmation mechanism available to the retail buyer.

	SUPPLIER CLAIM	BUYER CAN VERIFY?	VERIFICATION METHOD	RISK IF FALSE
USDA ORGANIC	Yes	NOP certificate check	Low -- enforcement exists	
NON-GMO PROJECT	Yes	Registry lookup	Low -- mark is governed	
COUNTRY OF ORIGIN	Yes	COOL regulation / import docs	Moderate -- labeling law	
"ARTISANAL"	No	No method exists	High -- no definition, no audit	
"HANDCRAFTED"	No	No method exists	High -- subjective, unregulated	
"SMALL-BATCH"	No	No method exists	High -- no threshold defined	

Regulatory status: FDA 21 CFR (no artisanal definition); USDA NOP 7 CFR 205; Non-GMO Project Standard v16; COOL Act, 7 USC 1638.

SPECIALTY SHOPPERS ARE CROSS-SHOPPING AND THEY WANT REASONS TO STAY

The Specialty Food Association reports that 44% of primary-store shoppers make trips to secondary stores specifically to find specialty items their regular store does not carry. That represents roughly \$1,200 in annual per-household sales at risk for any single retailer.

Shoppers are not disloyal -- they are underserved. When a store provides verifiable specialty curation, it reduces the incentive to cross-shop. The mark functions as a retention signal: it tells the shopper this store has already done the verification work.

- Specialty trips to secondary stores represent \$1,200/household/year in leakable sales
- Shoppers rank "complete ingredient list" and "certifications" among top transparency factors
- Trust in production claims directly correlates with repeat purchase frequency
- Verified marks reduce the cognitive load that drives hesitation at shelf

RETENTION METRICS

CROSS-SHOPPING FOR SPECIALTY

44%

SFA, Understanding the Real Value of Specialty Foods, 2024

ANNUAL LEAKABLE SPEND

\$1,200/HH

SFA, Understanding the Real Value of Specialty Foods, 2024

TRANSPARENCY PRIORITIZATION TREND

5-year increase

FMI/NielsenIQ, Transparency Trends, 2023

THIRD-PARTY VERIFICATION COMMANDS A MEASURABLE PREMIUM OVER SELF-DECLARATION

Deloitte's fresh food trust research found that consumer ratings on transparency -- already the weakest dimension of grocery trust -- fell between 2023 and 2024. Only 30% of consumers say they trust grocers to be transparent. Meanwhile, products carrying governed third-party marks consistently outperform unverified peers in both trial and repeat purchase rates. The gap between consumer demand for verification and the supply of verifiable claims represents unrealized margin.

KEY IMPLICATION

Trust is falling and verification demand is rising. Retailers who anchor premium claims to independent marks close the credibility gap that self-declared labels cannot.

30%

TRUST GROCERS ON TRANSPARENCY

Consumers who trust grocery retailers to be fully transparent about their products

Deloitte, Fresh Food Trust & Transparency, 2024

37%

CERTIFICATIONS DRIVE PURCHASE

Of consumers say certifications and third-party claims influence what they buy

Purdue CFDAS / FMI, Future of Traceability, 2023

26%

WANT PRODUCTION METHODS

Seek information about how products are produced, beyond ingredient lists

Purdue CFDAS / FMI, Future of Traceability, 2023

12%

SUSTAINABLE PREMIUM ACCEPTANCE

Average premium consumers will pay for verified sustainable fresh food claims

Deloitte, Fresh Food Trends, 2024

HOW A VERIFIED MARK CHANGES THE SHOPPER DECISION AT SHELF

The mark intervenes at the exact moment where unverified claims create hesitation, converting uncertainty into confidence.

01	CATEGORY ENTRY Shopper enters the specialty aisle or section with intent to purchase a premium product. They carry prior expectations from marketing, word-of-mouth, or previous experience.
02	CLAIM ENCOUNTER Multiple products present competing narratives: "artisanal," "handcrafted," "small-batch," "traditional." Without external signals, these claims are indistinguishable.
03	VERIFICATION SCAN The shopper looks for signals that resolve the claim: recognized marks, certifications, third-party endorsements. Products without them require the shopper to do their own research or guess.
04	MARK RECOGNITION The Certified Artisanal mark provides an immediate, institutional answer. It signals: this product was independently evaluated against published standards.
05	CONFIDENT PURCHASE The shopper selects the verified product with reduced hesitation. Post-purchase satisfaction is higher because the claim was backed by evidence, not just narrative.

CATEGORY STRATEGY

WHERE THE MARK CREATES THE MOST CATEGORY VALUE

Certification impact is highest in categories where production narrative drives the premium and verification is currently impossible.

	CLAIM VOLUME	VERIFICATION GAP	PREMIUM AT STAKE	MARK VALUE
CHEESE & DAIRY	Very High	No standard	30-60% above conventional	Critical
BREAD & BAKERY	Very High	No standard	40-80% above conventional	Critical
PRESERVED FOODS	High	No standard	25-50% above conventional	High
CHARCUTERIE & CURED MEATS	High	No standard	50-100% above conventional	High
CHOCOLATE & CONFECTIONS	Moderate	No standard	30-70% above conventional	High
CONDIMENTS & SAUCES	Moderate	No standard	20-40% above conventional	Moderate

Category premium ranges based on SPINS/SFA specialty category data, State of the Specialty Food Industry, 2024-25. Claim volume observations from Mintel GNPD tracking.

MERCHANDISING PLAYBOOK

FROM BUYER ADOPTION TO SHELF EXECUTION

A step-by-step operational model for integrating the mark into your category management workflow.



01	<p>CATEGORY REVIEW INTEGRATION</p> <p>During quarterly or seasonal assortment reviews, use Certified Artisanal status as a filter criterion alongside margin, velocity, and brand fit. The Foundation provides a current certified producer directory.</p>
02	<p>SUPPLIER EVALUATION</p> <p>For new supplier pitches that include "artisanal" claims, ask for Certified Artisanal status. If not yet certified, encourage application. This creates a consistent verification standard across all supplier conversations.</p>
03	<p>SHELF SIGNAGE & PLACEMENT</p> <p>Certified products can display the mark on packaging. The Foundation provides shelf-talker templates, section signage, and digital asset kits for in-store and e-commerce use.</p>
04	<p>STAFF ENABLEMENT</p> <p>The Foundation provides one-page training guides and optional webinars for floor staff. The goal: when a customer asks "what makes this artisanal?" your team has a concrete, institutional answer.</p>

Operational model developed in consultation with specialty retail category management practices.

PRIVATE LABEL GROWTH MAKES THIRD-PARTY SPECIALTY VERIFICATION MORE VALUABLE, NOT LESS

U.S. private label CPG sales reached \$330 billion, with retailers investing heavily in premium store-brand tiers. As private label quality improves and perception gaps close, the differentiator for specialty branded products shifts from "not store brand" to "verifiably different in how it is made."

Certified Artisanal provides exactly this distinction. It is not a brand claim or a marketing tier -- it is an independent production credential. This gives branded specialty products a defensible position that private label cannot replicate, because private label production methods are typically not disclosed or independently assessed.

- Private label quality perception now matches national brands in many categories
- Specialty branded products need verified differentiators beyond packaging and price
- The mark creates a structural moat: independent assessment of production methods
- Retailers benefit from both strong private label and verified specialty -- they are complementary

MARKET CONTEXT

U.S. PRIVATE LABEL CPG SALES

\$330B

Circana, Private Labels in the U.S., 2024

CONSUMER QUALITY TRUST, STORE VS. NATIONAL

Converging

Circana, Private Label Global Perspective, 2024

SPECIALTY FOOD SEGMENT GROWTH VS. CONVENTIONAL

2-3x rate

SFA, State of the Specialty Food Industry, 2024-25

PERFORMANCE CASE

THE COMMERCIAL LOGIC: VERIFIED CLAIMS PROTECT MARGIN AND REDUCE RETURN RISK

Specialty food delivers disproportionate margin contribution relative to shelf space. SPINS/SFA data shows specialty categories growing at 2-3x the rate of conventional grocery, with premium tiers outperforming value tiers on both velocity and margin. But these premiums depend on consumer trust in the production narrative. When that trust erodes, the premium erodes with it. The mark acts as margin insurance: it sustains the price justification by providing institutional backing.

KEY IMPLICATION

Specialty food is a growth engine for retail. Protecting the credibility of its premium claims protects the margin structure that makes the category valuable.

\$96.3B

SPECIALTY RETAIL GROCERY

Center-store specialty food and beverage sales at retail, 2024

SPINS/SFA, State of the Specialty Food Industry, 2024-25

44%

SECONDARY STORE TRIPS

Of primary-store shoppers who cross-shop specifically for specialty items

SFA, Understanding the Real Value of Specialty Foods, 2024

1,000+

SHOPPERS SURVEYED

In SFA study confirming specialty drives loyalty and incremental basket size

SFA, Understanding the Real Value of Specialty Foods, 2024

4%

F&B VALUE GROWTH FORECAST

Expected food and beverage value sales growth across retail in 2025

Circana Compass, Year-End 2024 F&B Outlook

SOURCES & REFERENCES

SPECIALTY FOOD MARKET SIZE

Specialty Food Association, "State of the Specialty Food Industry," 2024-25 Edition. Total market exceeded \$206 billion. Data powered by SPINS.

VALUE OF SPECIALTY FOODS

Specialty Food Association, "Understanding the Real Value of Specialty Foods," 2024 Edition. 1,000 shoppers and 100 retailers surveyed. 44% cross-shop for specialty.

SHOPPER TRANSPARENCY DEMAND

FMI -- The Food Industry Association and NielsenIQ, "Transparency Trends," 2023. Fourth in a multi-year series tracking shopper demand for product information.

CONSUMER TRACEABILITY EXPECTATIONS

Purdue University Center for Food Demand Analysis and Sustainability (CFDAS), "The Future of Traceability and Transparency in the Food System," 2023. 59% want production info; 49% influenced by certifications.

FRESH FOOD TRUST GAP

Deloitte, "Fresh Food, Trust, and Transparency," 2024. Only 30% of consumers trust grocery retailers on transparency. Ratings fell from 2023 to 2024.

CLEAN LABEL PERFORMANCE

NielsenIQ, "The State of Wellness and Better For Products," 2024. Clean label products grew 8% year-over-year vs. conventional peers.

PRIVATE LABEL MARKET

Circana, "Private Labels in the U.S.: Meeting Consumers Where They Are," 2024. U.S. private label CPG sales reached \$330 billion.

FOOD & BEVERAGE OUTLOOK

Circana Compass, "Year-End 2024 Food and Beverage Market Outlook," November 2024. Projects 4% F&B value growth for 2025.

REGULATORY ABSENCE

U.S. FDA, 21 CFR; USDA, 7 CFR; FTC Act Section 5. No federal definition of "artisanal" exists in any regulatory framework.

CLAIM PROLIFERATION

Mintel Global New Products Database (GNPD). Tracks new product launches and on-pack claims across 86 markets and 290 subcategories.

All statistics cited are from publicly available, independently published sources. Artisanal Foundation is not affiliated with any research organization cited above.

Artisanal Foundation

STOCK WHAT YOU CAN STAND BEHIND

The Certified Artisanal mark gives buyers a defensible, standards-based filter for specialty assortment decisions. It reduces claim risk, simplifies shopper decisions, and protects the premium margins that make the category worth stocking. No shelf fees. No commercial obligations. Just a verifiable signal your team and customers can trust.

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Category consultation available for qualified retail partners

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